
From: Brianna Fowler [REDACTED]
Sent: 7/20/2016 2:51:58 PM
To: Stewart Oldfield [REDACTED]
Subject: Updated [C]
Attachments: Account Planning Initiative_Elysium.xlsx; Account Planning Initiative_Orix.xlsx; Account Planning Initiative_Southern Financial.xlsx; Account Planning Initiative_Third Lake.xlsx

Classification: **Confidential**

From: Brianna Fowler
Sent: Wednesday, July 20, 2016 1:06 PM
To: Stewart Oldfield
Subject: RE: Account Planning [C]

Classification: **Confidential**

Need to fill in some blanks, but the attached have the majority of the info needed

From: Stewart Oldfield
Sent: Monday, July 18, 2016 2:42 PM
To: Brianna Fowler
Subject: FW: Account Planning [C]

Classification: **Confidential**

Please start to fill this in from the pipeline then you and I can complete together. Let's do it for:

Southern Financial (from list B)
Elysium
Third Lake
Orix

Thanks

From: Andrew Gallivan
Sent: Monday, July 18, 2016 1:06 PM
To: Stewart Oldfield
Subject: Account Planning [C]

Classification: **Confidential**

As I mentioned on the Monday sales call, The Wealth Management ExCo, with sponsorship from Fabrizio, is initiating a global account planning exercise aimed at identifying revenue enhancement opportunities across our client base. In the Americas, this exercise will initially focus on our largest clients (~top 100) plus any near-term opportunities identified by you and then eventually expanded over the course of the year. A half day workshop with senior leadership, product heads and relationship managers will be organized during the week of July 25 (specific date to be confirmed) to conduct a detailed review of identified opportunities and agree action plans.

In preparation for the workshop, we request support from each banker team in identifying potential opportunities and prospects:

A. At a minimum, identify at least 3 relationships with potential for revenue enhancement across your client base